Financial AdvisorTech Solutions Map

APRIL 2024

Latest version available at: kitces.com/fintechmap

FINANCIAL PLANNING

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eMoney, MoneyGuide, RightCapital, moneytree, NaviPlan, Cheshire Software, ExecPlan, inStream, PR Profiles, Plan Tech Hub, WealthCare, voyant, wealthtrace, MAXIFI

PLANNING LIGHT
advisys, NewRetirement, TIFIN WEALTH, ECF, nebo, GMO, Morningstar Goal Bridge, Caravel Concepts, Savology, ProjectionLab, Fiduciary genius

SPECIALIZED PLANNING

RETIREMENT
IncomeLab, Income Solver, RA, Bucket Bliss, JourneyGuide, timeline, SSAnalyzer, Maximize My Social Security, Savvy Social Security Planning, Social Security Timing, Income Discovery, the BigPicture, AnnuityCheck, IncomeConductor

ESTATE
Vanilla, Brentmark, Yourefolio, Number Cruncher, EstateView, LUMINARY, wealth

LEGACY
LifeSite, Helen's Plan, LegacyShield, everplans, prismm, Trustworthy, BEQUEST

TAX
holisticplan, Bloomberg BNA, CFS, TAX CLARITY, Planner CS, corvee, TaxCast

EQUITY COMP
myStockOptions.com, StockOpter, trayecto

EDUCATION
College Aid Pro, CSLA TECH, PAYFORED, StudentLoan Eliminator, CFS, payitoff, Finology software

CASH MANAGEMENT
Flourish, MAX, R&T, advisor.cash, SKYVIEW

CASH FLOW AUTOMATION
currence, Sequence

HEALTHCARE/MEDICARE
65, AVANTE, Healthpilot, caribou, HealthView, wealthcare planning

BUSINESS VALUATION
BIZ EQUITY, Capitaliz

OTHER
fpalpha, CHARITYVEST, Real Estate Financial Planner, Hope Trust, Sora, Special Needs Map, CFM, Carefull, opticive, Onramp Invest, PHILANTHPRO

INSURANCE INTELLIGENCE/METRICS
LISA, Veralytic, WINK

INVESTMENT MANAGEMENT

PERFORMANCE REPORTING
ALBRIDGE, AssetBook, Schwab Advisor Portfolio Connect, AssetSprout, FIRST RATE, POWERADVISOR LLC

TRADING/REBALANCING
iRebal, intellifio redblack, BLAZE PORTFOLIO, FLYER, Smartleaf, SOFTPAK, LIFEYIELD

PORTFOLIO MANAGEMENT
Tamarac, ORION, Morningstar Office, Black Diamond, intellifio office, Capitect, Profile, SMArtX, Objectway, ALTEXCHANGE, Libretto, amplify, ADDEPAR, panoramix, Advyzon, Advisor360°, d1g1t, SYTE, SYSTM, Vestmark, FinFolio, blueleaf, Orchetech, CIRCLE BLACK, AdvisorArch

HELD-AWAY ASSETS
Pontera, Future Capital, Plan Confidence

CUSTODIAL PLATFORM
Charles Schwab, TD Ameritrade Institutional, Wealthscape, NetX360, SEI, Altruist, Shareholders Service Group, Interactive Brokers, TradePMR, axos, Raymond James, APEX, RBC, Equity, eQuipt, Betterment for Advisors, ClientWorks, ASSETMARK, Goldman Sachs, ADVICEWORKS, entrustody

INVESTMENT DATA/ANALYTICS
Morningstar, YCHARTS, kwanti, Bloomberg Terminal, PORTFOLIO VISUALIZER, FACTSET, Fi360, Dimensional, koyfin, REFINITIV, AdvisorTools, BlackRock, Aladdin, CFRA, CHAIKIN, TRENDRATING, Zephyr, Windham Labs, bondIT, venn, InvestorPro, VettaFi, LOGICLY, Nasdaq, finmason, FeeMetrik(s), portfoliodesigner, equitoft/fund, BLUE VAULT, ORTEC FINANCE, canoe, telemet, BITA, magnifi, indexone, ADVISORWORLD, ALTIDAR, FinChat, MarketGrader, Personal Fund, Boosted.ai, ARQA, Jacobi

ESG/SRI
YourStake, act analytics, CLARITY AI, ethos, Reflect

401(K) IMPLEMENTATION
Betterment, Vestwell, FIDUCIARY SHIELD by BidMoni

RISK TOLERANCE
FinaMetrica, DataPoints, TOLERISK, Pocket Risk, finmason, ONPOINTE, Morningstar Global Risk Model, ATA RiskStation, STRATIFI, RISKPRO, CapitalPreferences, SMARTRISK

STRESS TESTING
MacroRisk, ORION Risk Intelligence, FABRIC, RiXtrema, finmason, ONPOINTE

ACCOUNT AGGREGATION
ByAllAccounts, Yodlee, ALBRIDGE, blueleaf, PLAID, Broadridge, AquMulate, eMoney, ARCH, masttro

DIGITAL ONBOARDING
Charles Schwab, SIGFIG, agreement express, fusionIQ, ETNA, Marstone, AdvisorEngine, Nest Wealth, SKIENCE, OnBord

CLIENT ENGAGEMENT

CLIENT MEETING SUPPORT
Mobile Assistant, PULSE360, Copytalk, Meetings Hub, FinMate AI, Jump, zocks, SpeakWrite

AI ASSISTANT
unblu, COGNICOR, Wealth Management GPT

CLIENT FEEDBACK
ABSOLUTE ENGAGEMENT, NEXA, PI Practice Intel

CLIENT DATA GATHERING
Precise FP, Jotform, TOUCHSTONE PATHWAY, LifeArcPlan

BEHAVIOR ASSESSMENTS
DataPoints, Financial DNA, Money Quotient, ANDES, ROL ADVISOR, Unitifi, FINANCIAL ADVISOR ALLY, LIFE STAGE INSIGHTS, ATLAS POINT, Qualitate, INVESTING YOU, SHAPING WEALTH, wealthfully, C&J INNOVATIONS

ADVICE ENGAGEMENT
fpPATHFINDER, knudge, asset+map, visiWealth, LUMIANT, BENTO ENGINE, InvestSuite, NOVATRAK, ForwardLane, CurrentClient, LIFEHUB

CLIENT PORTAL
eMoney, investcloud, SUMMITAS, Fyncancial, Monarch, CIRCLE BLACK, eVestech, KUBERA, ENTOLE, leafplanner

SCHEDULE APPS
Calendly, OnceHub, acuity:scheduling, Bookings, YouCanBookMe, GReminders, EngageWare

BUSINESS DEVELOPMENT

PROSPECTING
CATCHLIGHT, CASHMERE AI, wealthfeed, FINNY, aidentified, TIFIN AG, WEALTHAWK, EQUILAR

ADVISOR LEAD GEN
smartasset, ZOE, RAMSEY, WISERADVISOR, FEE-ONLY, Wealthramp, Financial Advisors, planswell, indyfin, rainbook, ADVISORFINDER, COMPARISON ADVISOR, Lasso, wealthtender, MyRIAPerfect, HARNESS WEALTH, DATALIGN, moneypickle, INVESTMENT FIRMS, Advice Chaser

DIGITAL MARKETING
fmg, SNAPPY KRAKEN, Intuit mailchimp, HubSpot, advisorstream, Broadridge, Levitate, CLEARNOMICS, hearsay, Lead Pilot, VettaFi Advisor Perspectives, WealthVoice, REACH STACK, Retirement Plan Marketing, FMeX, Advisor I/O, RWM, Testimonial IQ, Financial Finesse, denimsocial, Hyperchat Social, Seismic, Veriday, gainfully, centsai one, LeadCenter.AI, WEALTH I/O, MarketDesk, AMPLIFY REVIEWS, MyNameFlow

SALES ENABLEMENT
Nitrogen, ADVISORWORLD, capintel, VRGL, Elements, invyzia, equisoft/analyze, paraplanner.ai, Powder

401(K) PROPOSALS
PLANPRO, Fiduciary Works

OPERATIONS

CRM
REDTAIL, Wealthbox, salesforce, Advyzon, AdvisorEngine, Tamarac, Microsoft Dynamics 365, ProTracker Software, Less Annoying CRM, SmartOffice, nexj, equisoft, ugru, GORILLA 5, AdviCally, ADVISORS ASSISTANT

CRM OVERLAYS
XLR8, Practifi, SS&C Salentica, WealthConnect by GBST, shellblack, redcapture

ADVISORY FEE BILLING
AdvicePay, BILLFIN, BaySys, bill, SMARTKX, AdvisorBOB, BillFix

COMPLIANCE
Smartria, RIA in a Box, ORION, ComplianceAlpha, RegEd, PATRINA, DDW, Joot, FILE | 13F, RED OAK, RIA, Investorcom, Hadrius, complect, MCO, FINCompliance, LA MEER INC., REGVERSE

MANAGED SERVICE PROVIDERS
CLOUDSCALE 365, Visory, RIA WorkSpace, FUSIONNETIX

CYBERSECURITY
venn, adeliarisk, AdvisorArmor, wht, FCI, Buckler

DOCUMENT MANAGEMENT
Worldox, Laserfiche, netdocuments, REVVER, Paperclip, Finity360, conga, Docupace, LASER APP

FORMS-ONLY
Quik!

ADVISOR DATA WAREHOUSING
SKIENCE, AppCrown, WEALTH ACCESS, BridgeFT, MILEMARKER, Dispatch

E-SIGNATURE
DocuSign, Dropbox Sign, RightSignature, Adobe Sign, SIGNiX

CLIENT FILE SHARING
FutureVault, EGNYTE, box, ShareFile, ComConnect, SideDrawer, Dropbox

WORKFLOW SUPPORT
Docupace, conga, ADVISORTOUCH, HUBLY, finpace, asana, ABSOLUTE ENGAGEMENT, Forms Logic

COMMUNICATIONS ARCHIVING
smarsh, globalRELAY, erado, Message Watcher, REDTAIL, MirrorWeb, MyRepChat, Pagefreezer, presults

BUSINESS INTELLIGENCE/METRICS
truelytics, 3Xequity, AdvisorClarity

kitces.com LLC

= Category Newcomer